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AUG 12 2003

FEDERAL COMMUNICATIONS COMMISSION
OFFICE OF THE SECRETARY

Re *Ex Parte Presentation – MB Docket No. 02-235*

In accordance with Section 1.1206 of the Commission's Rules, 47 C.F.R. §1.1206, Telemundo Communications Group, Inc. ("Telemundo"), submits this letter to report that on August 8, 2003, Don Browne, Chief Operating Officer, Ibra Morales, President, Telemundo Stations Group, Bob Okun, Vice President of Government Relations, Bill LeBeau, Senior Regulatory Counsel, and Maria Rodriguez, Business Development, conferred with Chairman Michael Powell and his media legal adviser, Paul Gallant. The communications discussed how the proposed merger might affect Telemundo's ongoing operations, and whether any conditions (including joint sales limitations and access rules for talent and advertising) could adequately address the unique issues arising from the merger proposed in this proceeding. Telemundo also made available the attached presentation, which already has been submitted to the record.

An original and one copy of this *ex parte* letter are being filed with the Secretary's Office as required by Section 1.1206(b)(2) of the Commission's Rules. Please contact the undersigned if there are any questions with respect to this submission.

Very truly yours,

F William LeBeau

cc: HHS
Chairman Powell*
Paul Gallant, Media Legal Adviser to Chairman Powell*

^(*) w/o attachment)

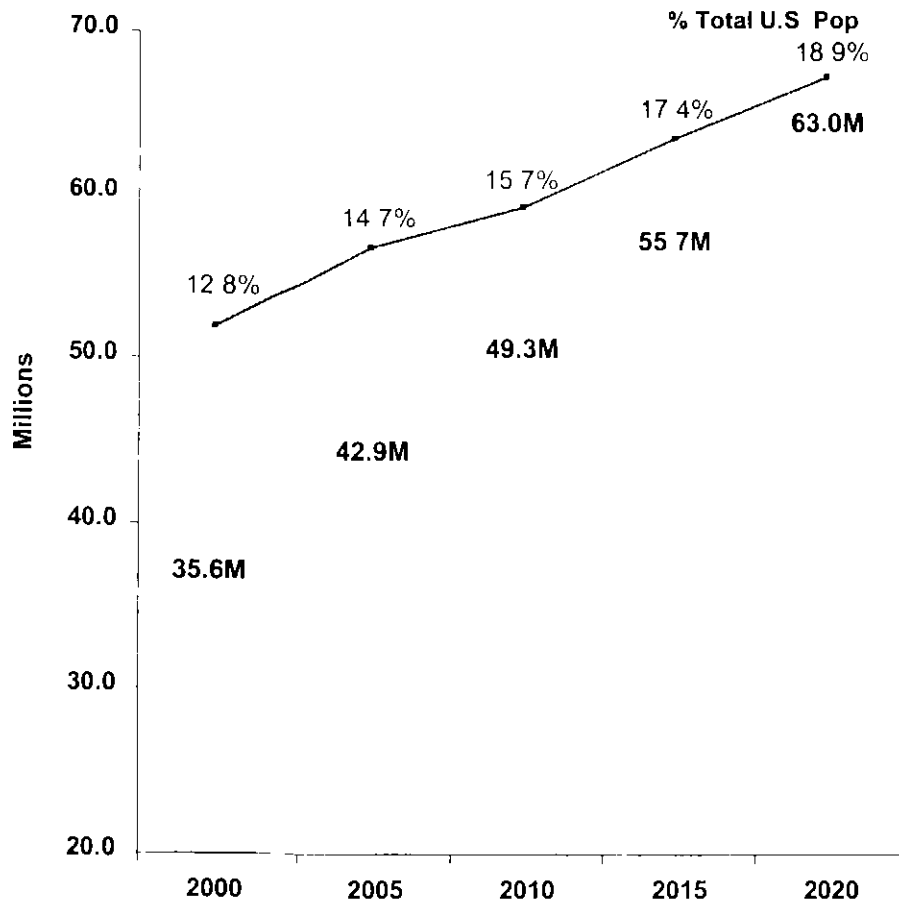
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HBC / Univision Merger

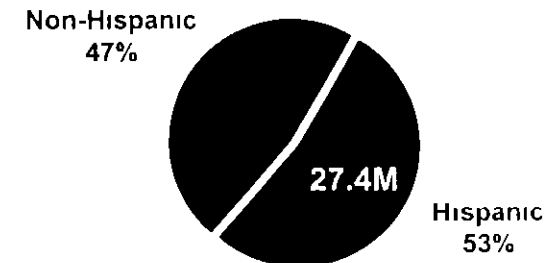
June 2003

Hispanic Context - Population Growth & Language

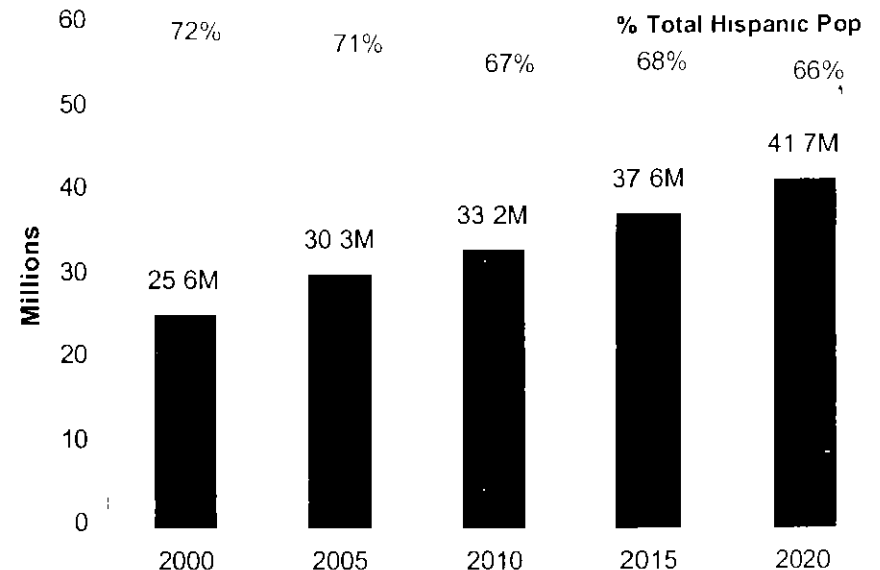
Hispanic Population



Share Of Population Growth '00-'20



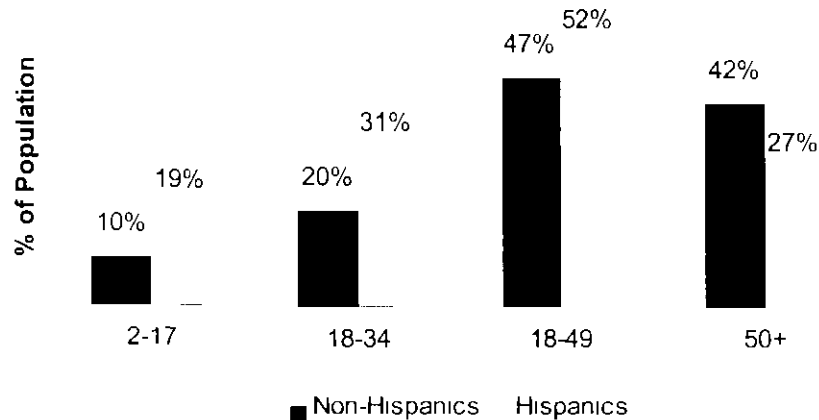
Spanish Spoken At Home Among Hispanics



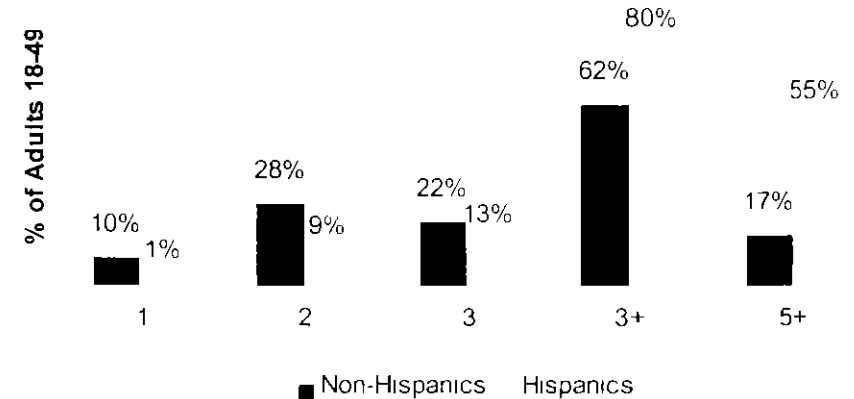
Nearly 50MM Hispanics In U.S. By 2010... Spanish Language Very Important... ~70% Speak Spanish At Home

Hispanic Context - Age, Education, Viewing Habits...

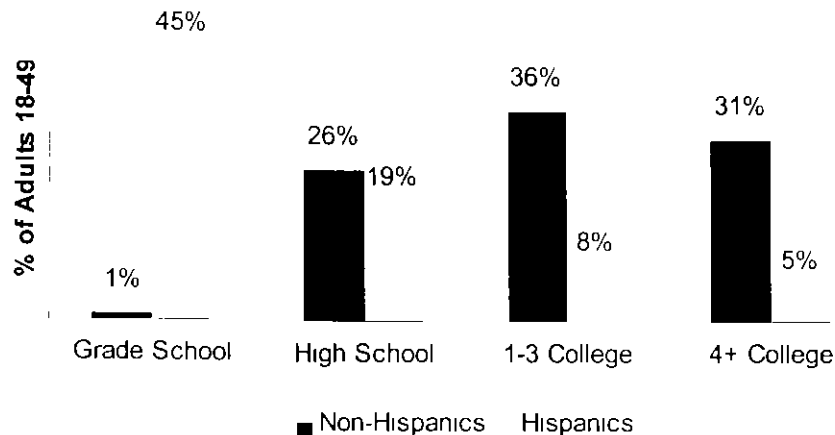
Age Distribution



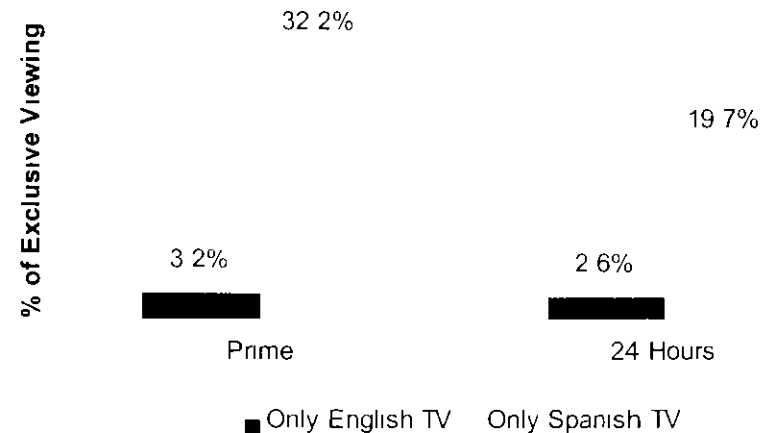
Persons Per Household



Education



TV Viewing Habits For Spanish Dominant

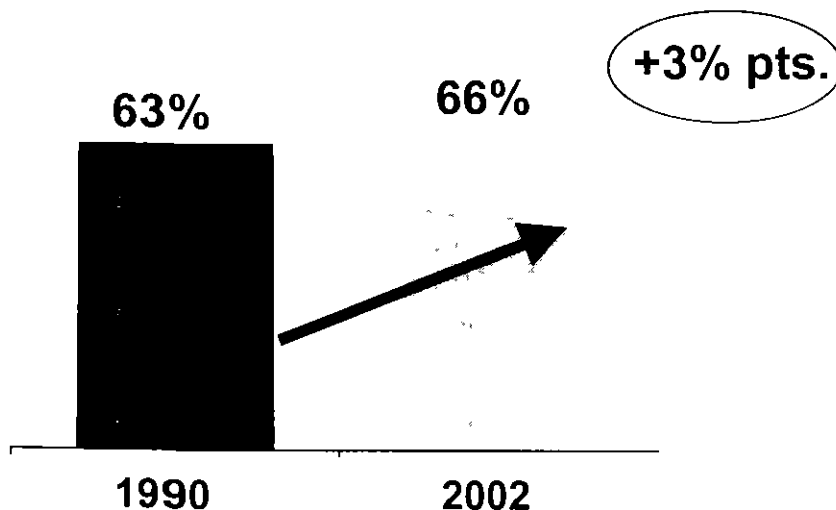


Language Not Only Differentiating Factor... Age, Education, Household Size & TV Viewing Habits... Demonstrate Distinct Nature Of Hispanic Market

Hispanic Context - The Importance Of Spanish

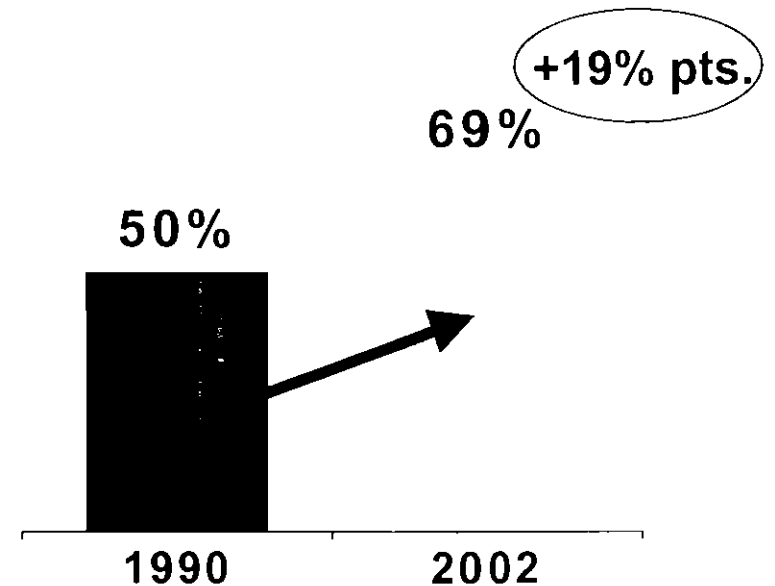
"The Spanish language is more important to me than it was just five years ago."

- % HISPANICS AGREE



"I get more information about a product when it's advertised in Spanish than when it's advertised in English only."

- % HISPANICS AGREE



Spanish Is Increasingly Important To Hispanics & An Important Conduit Of Information...

Hispanic Context - Media Usage & Options

- **Hispanic Media Usage Differs Substantially from English Language**

- **Watch TV More...**
- **Listen To Radio More...**
- **Read Newspapers Less...**
- **Use Internet Less...**

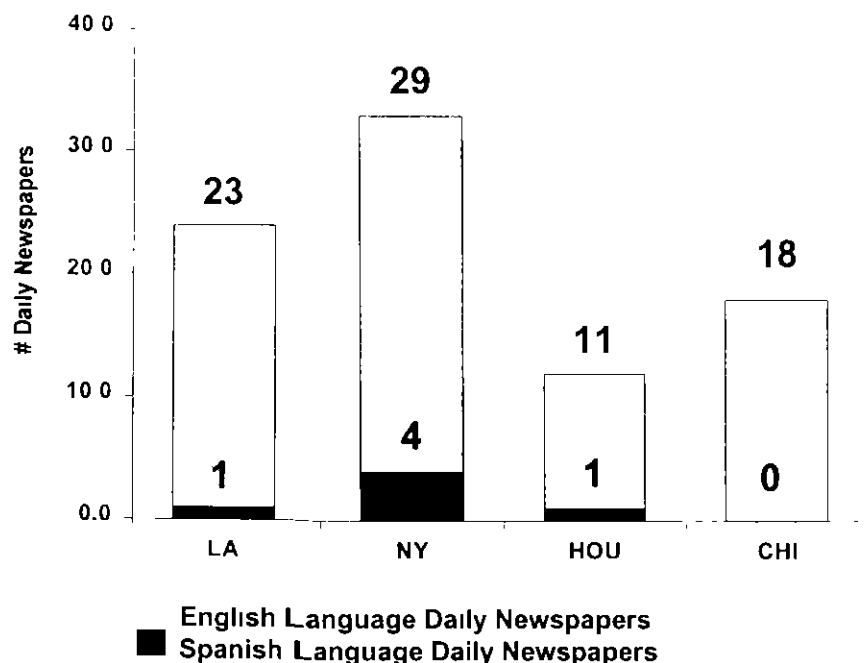
US Hispanic's Media Usage vs General Population			
	US Hispanics	General Population	Difference
Watch TV	99%	96%	3%
Listen to Radio	92%	83%	11%
Read Newspapers	69%	83%	-17%
Use Internet	41%	67%	-40%

- **Limited Spanish-language Media Options vs. English-language**
 - **Only 2 National TV & Radio Voices**
 - **No Daily Spanish-language Newspaper In 14 of top 20 Hispanic Markets**
 - **One or Fewer Spanish-language Newspapers In 3 of top 5 Hispanic Markets**
 - **Fewer Local Spanish-Language Radio Options: 7 vs 30 in NY, 9 vs 28 in LA, 6 vs 42 in Chicago**

Limited Spanish-Language Media Options... Heavy Reliance On TV & Radio

Hispanic Context: Newspaper Example

Daily Spanish-Language Newspapers vs. English-Language



Los Angeles Example

English Language

Top 10 LA Daily Newspapers Circulation 2,406,801

LA Households 5,434,500

Top 10 LA Newspapers Penetration 44%

Spanish Language

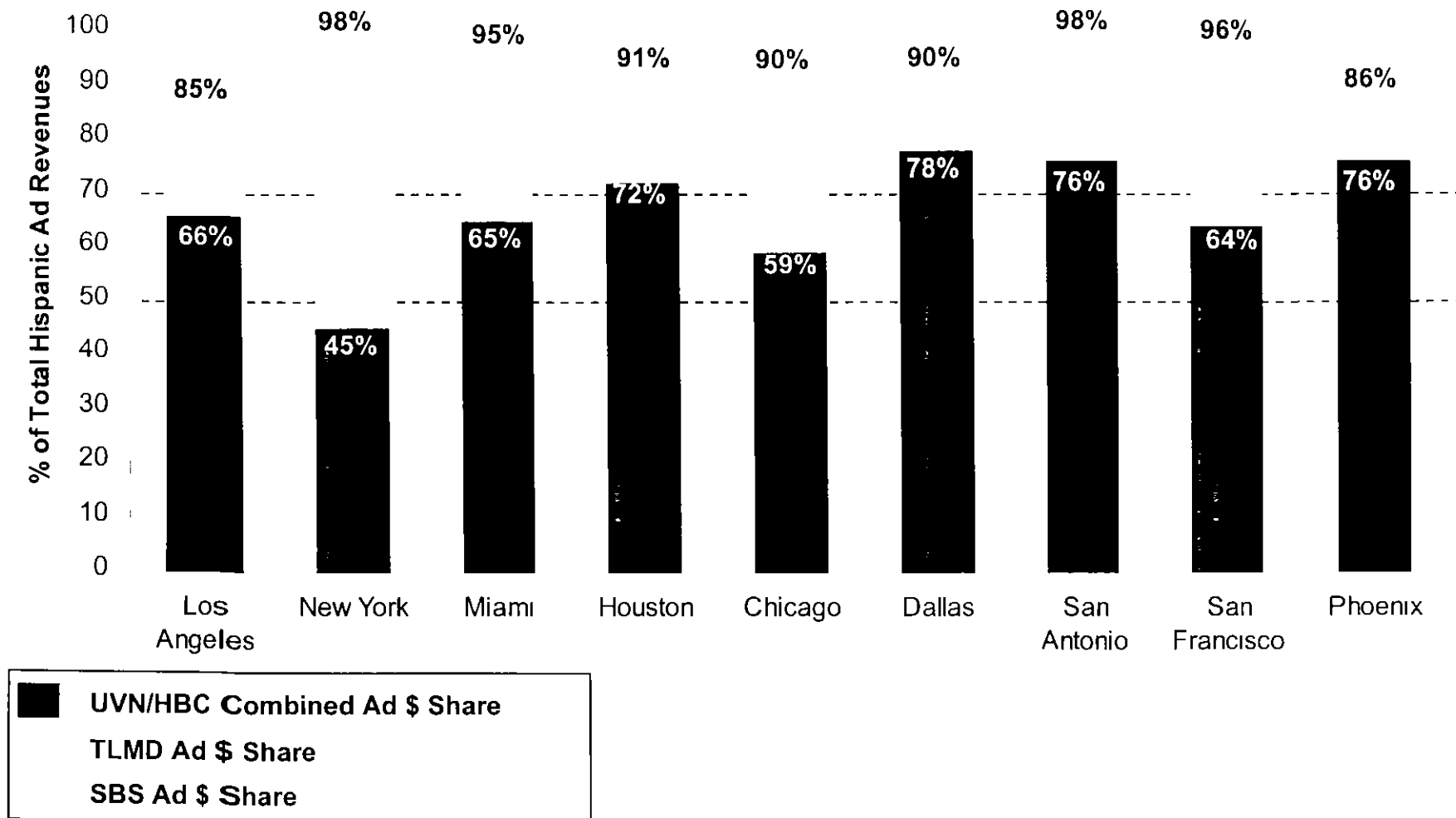
Sole LA Daily Spanish Newspaper Circulation 128,494

LA Hispanic Households 1,573,400

Spanish-language Newspaper Penetration 8%

Largest Spanish-Language Newspaper In US "La Opinion" Reaches Only 8% Of LA's Hispanics... Spanish Print Is Less Viable Media Option

Impact on Competition: UVN/HBC Market Share



UVN/HBC Will Capture Over 70% Of Local Ad Dollars In 4 Of Top 9 Hispanic Markets And Over 50% In 8 Of 9 Top Markets

Impact on Diversity: Phoenix Case Study

- **1MM Hispanics (3% of US total) principally served by 1 TV voice**
 - Univision owns only full power Spanish-language TV station covering Phoenix
 - Little choice for viewers or advertisers
- **Phoenix Hispanics depend heavily on free over-the-air TV**
 - Only 24% of Phoenix Spanish-speakers subscribe to cable... Few can receive low power TV signals
 - No other full power stations available at feasible pricing
- **No Daily Spanish-Language Newspaper**
- **Combination Of #1 Spanish-Language TV & Radio Stations In Phoenix... Leads To Significant Concentration**
 - With HBC, Univision gains 5 Spanish radio stations in market
 - UNV Already 92% Of Prime Time TV Audience... Will add #1 Spanish Language Radio Station In Market
 - HBC-UVN Combined Will Control 76% Of Spanish TV & Radio Ad \$ In Phoenix

Phoenix Market Illustrates High Degree Of Viewer and Advertising Concentration In Major Hispanic Markets